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# World Production and Trade

United States  
Department of  
Agriculture

Foreign  
Agricultural  
Service

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Weekly  
Roundup

WR 23-85

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The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

## GRAIN AND FEED

TUNISIA's 1985/86 total grain crop is estimated at 1.22 million tons, 20 percent above last year's drought-reduced harvest, according to the U.S. agricultural officer in Tunis. Total wheat production in 1985/86 is estimated at 850,000 tons, 20 percent above last year, and is comprised of an estimated 700,000 of durum and 150,000 of soft wheat. Barley production is estimated at 370,000 tons, 19 percent above last year. Winter grain yields are expected to rebound from the drought-affected crops harvested the previous two years. Moisture conditions during the growing season were mostly favorable. Much of the grain crop will be harvested during the June through July period.

## OILSEEDS AND PRODUCTS

ARGENTINA has reduced the export tax on soybeans from 25 to 23 percent of the f.o.b. value. The 1.5-percent INTA (government research agency) tax is still in place, which puts the total tax now at 24.5 percent. The tax reduction actually improves the exchange rate for soybean exports by almost 3 percent. Soybean product export taxes have not been changed, narrowing the tax differential between soybeans and products.

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Following many years of total domination in the market, the U.S. soybean market share in INDONESIA is eroding. The U.S. market share fell from 100 percent in 1983 to 82 percent in 1984 and to 73 percent in early 1985, with China taking up the slack. At present, all soybeans in Indonesia are used for food, although plans to open a crushing plant in 1986 are pending. The government is attempting to curtail soybean meal imports, but these are expected to remain in the 200,000 to 250,000-ton range in 1985 and 1986. The U.S. share of the soybean meal market should continue at about 30 percent.

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LYNN K. GOLDSBROUGH, Editor, Tel. (202) 382-9442. Additional copies may be obtained from FAS Media and Public Affairs Branch, 5918-S, Washington, D.C. 20250. Tel. (202) 447-7937.

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# DAIRY, LIVESTOCK AND POULTRY

Total meat production in SELECTED COUNTRIES in 1985 is forecast at 124.1 million tons, 745,000 tons above the April forecast reported in circular FL&P-1 and nearly 1.6 million tons above last year's revised estimate. The most significant change from April is the upward revision in total 1985 pork production with most of the expansion expected to occur in China. Total beef and veal production for 1985 is up slightly based on larger output forecast for the Soviet Union and European Community (EC). The general outlook for world poultry meat and egg production has not changed significantly from April. World meat output in 1984 was revised upward by 422,000 tons to 122.6 million based primarily on larger China pork and EC beef and veal output.

## Meat Production in Selected Countries (In million tons 1/)

	1983	1984 2/	1985 3/ April	June
Beef and veal	41.2	41.9	41.7	41.9
Pork	50.9	52.1	52.2	52.7
Sheep and goat	4.6	4.5	4.7	4.6
Total red meat	96.7	98.5	98.5	99.2
Poultry meat	23.5	24.1	24.9	24.9
Total meat	120.1	122.6	123.4	124.1

1/ Numbers may not add due to rounding. 2/ Estimate. 3/ Forecast.

WORLD beef and veal production for 1985 is forecast at 41.9 million tons, up 198,000 tons from the April forecast and the same as last year. Important changes from the April forecasts are as follows:

European Community: Beef and veal production in 1985 is forecast at 7.3 million tons, 95,000 tons above April's forecast and about 2 percent below last year's output. The increase from April is based on expected higher slaughter in the Netherlands, Italy and the United Kingdom. EC cattle numbers for 1985 (beginning) are estimated at 78.5 million head, about 400,000 head above April's estimate and 1 percent below the 1984 level. Cattle numbers were not down as much as earlier estimated primarily because of a larger calf crop and lower death loss in the United Kingdom.

Soviet Union: Beef production in 1985 is forecast at 7.3 million tons, 100,000 tons above April's forecast and 200,000 tons above last year. The production forecast since April was revised upward based on a larger than expected output in the state and collective farm sector during the first four months of this year.

Canada: Beef production for 1985 is forecast at 985,000 tons, up 15,000 tons from April's forecast based on a higher-than-expected level of cow and heifer slaughter during the first quarter of this year. This higher slaughter is due to last year's drought in western Canada that reduced winter forage and damaged pastures. Cattle slaughter is expected to fall below year-ago levels when pasture conditions improve.



New Zealand: Beef and veal production for 1985 is forecast at 13,000 tons, or 10,000 tons above April's forecast and 7 percent above the 1984 level. The increase in the production forecast from April is due to herd culling caused by drought in areas that hold about one-third of New Zealand's cattle.

Australia: Beef production for 1985 is forecast at 1.27 million tons, unchanged from April's forecast, but up 2 percent from last year. Serious drought problems have been reported in parts of Queensland and New South Wales, but the affected areas within these regions represent a small proportion of Australia's cattle and sheep population.

#### Cattle and Buffalo Numbers and Beef Production 1/

	Beginning Cattle Inventory				Beef and Veal Production			
	1983	1984	1985 2/		1983	1984 2/	1985 3/	
	April June				April June			
	-----Million Head-----				-----Million Tons-----			
United States	115.0	113.7	109.8	109.8	10.7	10.9	10.6	10.6
Canada	11.7	11.4	11.0	11.0	1.0	1.0	1.0	1.0
EC-10	78.8	79.4	78.1	78.5	6.8	7.4	7.2	7.3
Eastern Europe	37.1	37.8	38.0	37.8	2.5	2.5	2.5	2.5
Soviet Union	117.2	119.6	120.8	120.8	7.0	7.1	7.2	7.3
Argentina	58.0	58.6	58.8	58.8	2.4	2.6	2.7	2.7
Uruguay	10.3	9.5	9.9	9.9	0.4	0.3	0.3	0.3
Australia	22.5	21.8	22.5	22.5	1.4	1.2	1.3	1.3
New Zealand	7.9	7.6	7.9	7.9	0.5	0.5	0.5	0.5
Total of 51 countries	944.0	946.8	945.5	945.7	41.2	41.9	41.7	41.9

1/ Includes buffalo numbers and meat production. 2/ Estimate. 3/ Forecast.

WORLD hog numbers for 1985 (beginning) are estimated at 708.6 million head, 740,000 head above April's estimate and 5.2 million above the 1984 level. The larger-than-expected expansion in 1985 inventories was due to an increase in EC hog numbers that more than offset a downward revision in East European hogs. Pork production in 1985 is forecast at 52.7 million tons, 517,000 tons above April's forecast and 598,000 above 1984. China accounts for most of the projected expansion in pork output. Important changes from the April forecasts are as follows:

China: Pork production in 1985 is forecast at 14.75 million tons or 400,000 tons above April's forecast and 3.5 percent above last year's output. Pork production expanded by more than 1 million tons in 1984 and expansion is expected to continue this year because the government has increased producer incentives.



European Community: Hog numbers for 1985 (beginning) are estimated at 79.6 million head, about 1.5 million above April's estimate and 250,000 head above a year ago. The upward revision in hog numbers from the April estimate is due largely to increases made in beginning inventories in France and the Netherlands because of larger-than-expected pig crops in 1984. Pork production for 1985 is forecast at 9.96 million tons, 117,000 tons above April's forecast and 159,000 tons above the 1984 level. The upward revision in the forecast since April is due to the expanded production outlook in France, Denmark and the Netherlands.

Eastern Europe: Hog numbers for 1985 (beginning) are estimated at 73.47 million head, 741,000 head below April's estimate, but 188,000 head above a year ago. The revision in East European hog numbers from the April estimate is due largely to a 565,000-head reduction in Hungary's inventories, attributed to herd culling in 1984.

#### Hog Numbers and Pork Production

	Beginning Hog Inventory				Pork Production			
	1983	1984	1985 1/ April June		1983	1984 1/ April June	1985 2/ April June	
	-----Million Head-----				-----Million Tons-----			
United States	54.5	56.7	54.0	54.0	6.9	6.7	6.5	6.5
Canada	10.1	10.7	10.8	10.9	0.9	0.9	0.9	0.9
EC-10	79.2	79.4	78.1	79.6	9.7	9.8	9.8	10.0
Eastern Europe	70.7	73.3	74.2	73.5	6.6	6.8	6.9	6.9
Soviet Union	76.7	78.7	77.8	77.8	5.8	5.9	6.0	6.0
China	300.8	298.5	306.1	306.1	13.2	14.3	14.4	14.8
Total of 37 countries	700.2	703.4	707.8	708.6	50.9	52.1	52.2	52.7

1/ Estimate. 2/ Forecast.

WORLD sheep numbers for 1985 (beginning) are estimated at 674.9 million head, 153,000 head below April's estimate and 260,000 head below 1984. This year's beginning inventories were reduced from the April estimate because of smaller-than-expected expansion last year in Eastern Europe. Sheep and goat meat production in 1985 is forecast at 4.65 million tons, essentially unchanged from April.

New Zealand: Sheep meat production in 1985 is now forecast at 667,000 tons, 14,000 tons below April's forecast but 5 percent above the 1984 output. The New Zealand production forecast was reduced since April because of drought in areas containing most of New Zealand's sheep, which has resulted in lower carcass weights.

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# Sheep Numbers and Sheep and Goat Meat Production

	Beginning Sheep Inventory				Sheep and Goat Meat Production			
	1983	1984	1985 1/		1983	1984 1/	1985 2/	
			April	June			April	June
	-----Million Head-----				-----Million Tons-----			
Soviet Union	142.2	145.3	142.4	142.4	0.84	0.83	0.80	0.80
Australia	133.2	139.3	144.0	144.0	0.45	0.44	0.52	0.52
New Zealand	70.3	70.3	70.3	70.3	0.65	0.64	0.68	0.67
Total of 29 countries	664.3	675.2	675.1	674.9	4.58	4.53	4.66	4.65

1/ Estimate. 2/ Forecast.

The general outlook for WORLD poultry meat and egg production has not changed significantly from the April forecast. Total 1985 poultry meat production is forecast at 24.9 million tons, essentially unchanged from April and 3.6 percent above the 1984 level.

## Poultry Meat and Egg Production

Country	Total Poultry Meat				Eggs			
	1983	1984 1/	1985 2/		1983	1984 1/	1985 2/	
			April	June			April	June
	-----Thousand Tons-----				-----Billion Units-----			
United States	7,151	7,435	7,906	7,838	67.9	68.5	70.0	69.4
Brazil	1,580	1,450	1,520	1,520	9.0	8.5	9.0	9.0
EC-10	4,293	4,275	4,350	4,350	70.6	70.9	70.7	70.7
Spain	813	830	813	830	12.2	11.1	11.5	11.5
Hungary	390	360	360	360	4.5	4.5	4.5	4.5
Soviet Union	2,596	2,675	2,800	2,800	75.1	76.0	76.8	76.8
Total includes 44 countries	23,484	24,057	24,885	24,925	352.3	355.3	360.5	358.9

1/ Estimated. 2/ Forecast.

## Broiler and Turkey Meat Production

Country	Broilers				Turkeys			
	1983	1984 1/	1985 2/		1983	1984 1/	1985 2/	
			April	June			April	June
	-----Thousand Tons-----				-----Thousand Tons-----			
United States	5,625	5,902	6,281	6,228	1,202	1,218	1,275	1,276
Brazil	1,490	1,360	1,430	1,430	NA	NA	NA	NA
EC-10	2,899	2,900	2,951	2,951	723	725	734	734
Spain	743	765	760	760	16	17	18	18
Hungary	288	250	270	270	NA	NA	NA	NA
Soviet Union	800	850	900	900	49	50	51	51
Total 3/	16,057	16,522	17,230	17,171	2,218	2,244	2,311	2,312

1/ Estimate. 2/ Forecast. 3/ Includes 32 countries for broilers and 19 countries for turkeys.



## COTTON

COLOMBIA's Minister of Development signed a bilateral barter trade agreement with Czechoslovakia May 21, under which Czechoslovakia will trade fertilizer plants, spinning mills, cotton looms and other industrial products in payment for various tropical agricultural products, cotton, textiles, garments, tobacco and rice. A Czech representative will sign the implementing document in July.

## TOBACCO

WORLD total unmanufactured tobacco production in 1985 is forecast at 6.3 million tons, 1 percent below last year's crop and 9 percent below the record 6.9-million-ton crop produced in 1982. The tobacco crop in China, the world's largest producer, is estimated at 1.8 million tons, 7 percent above last year's crop but 18 percent below the record level of 2.2 million tons achieved in 1982.

Tobacco production in China has been difficult to stabilize due to favorable grower prices and substantial tax revenues local governments receive for the sale of tobacco to factories. However, quality problems still persist despite measures to produce more medium and high-quality leaf. To promote the production of more high-quality tobacco, the price paid for top quality tobacco is expected to increase by about 20 percent.

Other major tobacco-producing countries with sizable prospective crop increases include Indonesia, Colombia, Pakistan, South Africa, Bulgaria, Yugoslavia and Mexico. However, smaller crops are expected in the Philippines, Argentina, Japan, Canada, the Republic of Korea, Zimbabwe, Brazil, the Soviet Union and Greece. In the United States, production is projected to fall due to large carryover stocks and lower domestic use.

The 1985 world flue-cured tobacco crop is forecast at 3.1 million tons, virtually unchanged from last year's crop. Although production is expected to fall in the United States due to about an 8-percent area decrease, output in China, the world's largest producer, is expected to be up about one-tenth as a result of attractive prices. Flue-cured tobacco continues to represent nearly 85 percent of total output in China.

In Canada, the 1985 flue-cured crop is expected to fall about 10 percent. The recently created National Flue-cured Tobacco Marketing Agency is expecting legislative authority to enforce strict production controls. Production is also expected to fall this year due to weak domestic and export demand. Price levels for flue-cured tobacco are determined by the general market price established between the Ontario Flue-cured Tobacco Grower's Marketing Board (OFCTGMB) and the Canadian Tobacco Manufacturer's Council (CTMC). To date, a price agreement for the 1985 crop has not been finalized.

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Flue-cured production is projected to fall in a number of other major producing countries, including the Philippines, the Republic of Korea and India due to efforts to reduce excessive stock levels. Output is also anticipated to decline in Brazil. In Japan, area planted to tobacco continues to decline as farmers shift to other crops. The flue-cured crop in Zimbabwe is forecast to fall 1 percent as farmers attempt to meet government production quotas. Increased output is expected in a number of producing countries, including Poland, Indonesia, Pakistan, South Africa and Indonesia.

The 1985 world burley crop is forecast at 688,000 tons, down 8 percent from last year. Production in the United States, the world's largest producer, is projected to decline mainly as a result of a drop in planted area. Output is also expected to fall in Korea and Spain due to attempts to reduce excessive supplies. In Brazil, production is also expected to fall. In Mexico, however, production is forecast to register an increase as a result of a 3-percent area increase. The crop in Malawi is expected to be in line with last year's level as the government continues its efforts to stabilize price levels.

The 1985 world oriental tobacco crop is forecast at 957,000 tons, slightly above last year's outturn. In the Soviet Union, the world's largest producer, output is expected to fall about 1 percent as two consecutive years of bumper crops have strained storage and processing facilities. In Greece, output is expected to fall around 4 percent due to government policy which encourages a shift from oriental tobacco to more exportable types. Production increases are anticipated in Turkey, Bulgaria and Yugoslavia.

World dark air/sun-cured tobacco production in 1985 is forecast at 1.1 million tons, slightly below last year's crop. In India, the world's largest producer, output is expected to fall due to the government's acreage reduction program, which was enacted to avoid large carryover stocks. In Poland and France, production is also expected to be down as area shifts to lighter tobaccos continue. In China, production is anticipated to increase due to a 12-percent increase in area. The 1985 crop in Indonesia is also expected to increase due to favorable tobacco prices.

World unmanufactured tobacco production for 1984 and 1985, by leaf type, is forecast in 1,000 tons as follows:

Leaf type	Revised 1984	Forecast 1985 1/
Flue-cured	3,107.0	3,103
Burley	751.5	688
Oriental	953.0	957
Dark air/sun-cured	1,116.0	1,108
Light air-cured	130.3	123
Dark air-cured, cigar	215.9	212
Dark fire-cured	72.4	67
Total	6,346.1	6,258

1/ Chances are 2 out of 3 that the outcome will be within 329,000 tons of this forecast.

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## VEGETABLES

In FRANCE, 1985 processing tomato production is forecast at 370,000 tons, up 1 percent from last year's crop, according to the U.S. agricultural counselor in Paris. Area is expected to increase slightly, while average yield is forecast to match last year's level. France is a net importer of canned tomatoes and canned tomato paste.

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In PORTUGAL, 1985 processing tomato production is forecast at 736,000 tons, up 6 percent from last year, according to the U.S. agricultural counselor in Lisbon. Area is expected to be similar to last year's 21,000 hectares; however, average yield is forecast to be up from last year.

Portugal is scheduled to join the European Community (EC) in January 1986. Beginning in 1986, growers will receive a guaranteed price set by the EC. This guaranteed price will start at a lower level than that of the remaining member countries, but will be aligned to EC prices by 1992.

\*\*\*\*\*

ITALY's 1985 processing tomato production is forecast at 3.7 million tons, down 34 percent from last year's record harvest, according to the U.S. agricultural counselor in Rome. The sharp decline in projected output is attributed to production constraints imposed by the European Community and the Italian government following last year's overproduction.

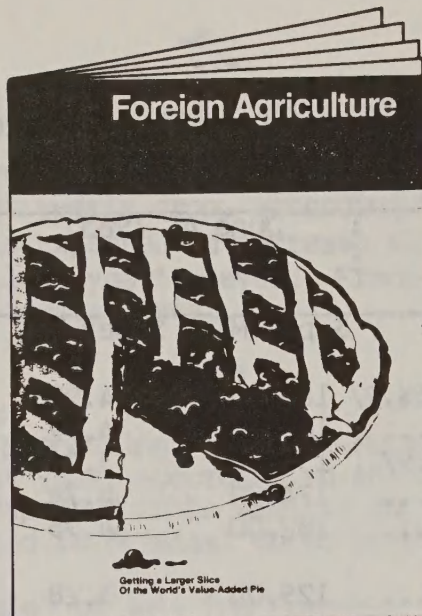
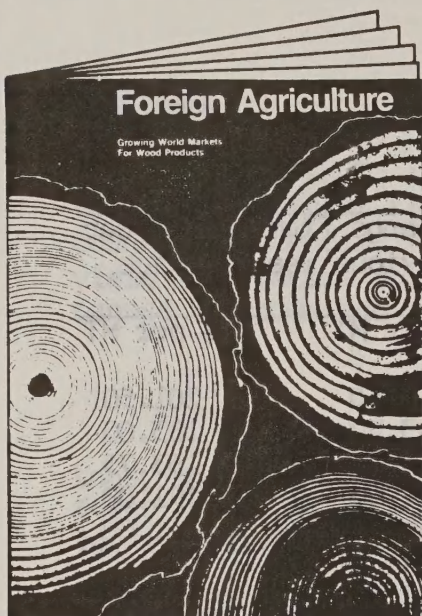


Selected International Prices

Item	: June 4, 1985	: Change from	: A year
	:	: previous week	: ago
ROTTERDAM PRICES 1/	\$ per MT	\$ per bu.	\$ per MT
Wheat:			
Canadian No. 1 CWRS-13.5%.9/	183.50	4.99	+1.50
U.S. No. 2 DNS/NS: 14%....	168.50	4.59	+3.50
U.S. No. 2 S.R.W. ....9/	139.00	3.78	0
U.S. No. 3 H.A.D.....	174.00	4.74	-2.00
Canadian No. 1 A: Durum...	182.00	4.95	-2.25
Feed grains:			
U.S. No. 3 Yellow Corn....	129.00	3.28	-1.50
Soybeans and meal:			
U.S. No. 2 Yellow.....10/	227.00	6.18	-2.25
Brazil 47/48% SoyaPellets 4/	136.50	--	-1.00
U.S. 44% Soybean Meal....	138.00	--	-3.00
U.S. FARM PRICES 3/			
Wheat.....	118.67	3.23	-1.84
Barley.....	81.30	1.77	-2.30
Corn.....	103.94	2.64	+1.18
Sorghum.....	98.33	4.46 2/	+1.32
Broilers 7/.....	1153.67	--	-31.97
EC IMPORT LEVIES			
Wheat 5/.....	80.95	2.20	+7.05
Barley.....	71.05	1.55	+3.45
Corn.....	63.60	1.62	+3.60
Sorghum.....	79.75	2.03	+8.30
Broilers 4/ 6/ 8/.....	163.00	--	+3.00
EC INTERVENTION PRICES 7/			
Common wheat(feed quality)	152.00	4.14	+2.95
Bread wheat (min. quality)7/	161.45	4.39	+3.10
Barley and all			
other feed grains.....	152.00	--	+2.95
Broilers 4/ 6/.....	1040.00	--	-30.00
EC EXPORT RESTITUTIONS (subsidies)			
Wheat .....	29.95	.82	+1.70
Barley.....	47.50	1.03	+.45
Broilers 4/ 6/ 8/.....	96.00	-1.00	+2.00

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Hundredweight (CWT). 3/ Twelve-city average, wholesale weighted average. 4/ EC category--70 percent whole chicken. 5/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 9/14/83 from 22.50 ECU/100 bag set in 2/83. 6/ F.o.b. price for R.T.C. broilers at West German border. 7/ Reference price. 8/Reflects change in level set by EC. 9/ July shipment. 10/September shipment. N.A.=None authorized. N.Q.=Not quoted. Note: Basis June delivery.





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